

Montana Shared Catalog (MSC) Standard Cataloging Procedures

Revision March 2017

[MSC Content Management Committee](#)

This document is meant to be a guide for cataloging practices in the Montana Shared Catalog library consortium. For more explanation of the topics covered herein please refer to the Help menu in WorkFlows, or contact the [MSC staff](#) or your [cataloging mentor](#).

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1. Introduction

The [Montana Shared Catalog \(MSC\)](#) serves a diverse group of libraries, including special, academic, school, and public libraries. The purpose of these procedures is to create consistency within the bibliographic records in the catalog. Member libraries and their patrons rely on the integrity of the catalog. Consistency is vital. It is the responsibility of each MSC member library to be consistent in following these procedures.

1.1 How to use this document

This document is intended to be used as a digital document. Reading this document from your computer makes the links within the manual accessible. If links do not work, please contact the MSC or download an updated version of the manual, as links will be reviewed and corrected as necessary.

This document has been separated into sections based on cataloging tasks. Libraries that do copy cataloging and rarely modify title/bibliographic records will primarily use section 3 and section 4. Instances where new records need to be created are explained in section 5. Please note that section 5 is not an explanation of how to create original MARC records from scratch; that is beyond the scope of this manual. Instead, section 6 will explain rules for modifying and enhancing records in the current MSC system, SirsiDynix Symphony Workflows. Other sections cover special topics, including: cataloging

serials, series and multi-part works (section 7); removing records (section 8.2); transferring items between records (section 8.1); creating brief records for interlibrary loans (section 5.2); and special cataloging situations, like book kits (section 5.5) and eReaders (section 5.6). A MARC tag “cheat sheet” is also included in Appendix. Refer to the Table of Contents for more detail and for hyperlinked shortcuts to each section.

For more information about the basics of cataloging, *MARC21 for Everyone: A Practical Guide* by Deborah Fritz is a good first resource for new catalogers.

1.2 How to get help

The Montana Shared Catalog staff can be reached by phone, email, and through the help desk ticket system. Enter a [help desk ticket](#) with the details of your question or problem. The most effective tickets contain specific information about issues as well as item IDs, call numbers or title control numbers. By phone, the state library and MSC staff can be reached toll-free at 1-800-338-5087. Current contact information for individual staff can be found at the MSC [Contact Us](#) page.

2. Bibliographic Record Standards

Before modifying, creating, or loading bibliographic records into the MSC, catalogers must first be familiar with MSC record standards. These standards exist in order to ensure consistent record quality, to aid patron discovery, and to conform to resource sharing guidelines created by OCLC. Member libraries are responsible for adhering to standards of quality for all bibliographic records to which they have attached their items/holdings.

Types of records

The type of bibliographic record governs its record standard in the MSC. There are two main types: permanent and temporary records. Each has several sub-types.

- Permanent records
 - Full - fully cataloged records whose holdings appear in OCLC
 - Local - records for use in-house or local use only (e.g. equipment such as e-Readers, DVD players, or life jackets, fishing poles) – items whose holdings do not appear in OCLC (see [sections 5.5, 5.6, 5.7](#))
- Temporary records – some of these can become permanent records, but are intended to exist for only a short time in the catalog
 - Brief – records for items that are in your collection but do not have a permanent record at the time of check-out (see [section 5.1](#))
 - ILL – records that correspond to incoming Interlibrary loan items (see [section 5.2](#))
 - On-Order – records that correspond to items on order, often for use with the Acquisitions Module using the ON-ORDER format, which will be fully cataloged once the item arrives (see [section 5.3](#))
 - CIP – (Cataloging-in-publication) records lacking appropriate descriptions of the published item designated by Encoding Level 8 in the fixed field (see [section 5.4](#))

2.1 MARC Record Standard for Permanent Records

As you choose records to attach to or import, please note that the **minimum** tags and indicators for **Permanent Full** records required by the MSC are:

- (001) Control number (OCLC number preferred, should not include vendor control numbers)

- (007) Physical characteristics (for audio-visual, large print and kits only) (see [section 6.5](#))
- (010) Library of Congress catalog number (if available)
- (020) ISBN (if available, see [section 6.7](#))
- (035) OCLC control number (if available)
- (1XX) author, when applicable with proper indicators
- (245) title, with proper indicators
- (260/264) publication information (260 appears only in hybridized records, see [section 2.3](#))
- (300) physical description
- (33X) Content, media, and carrier (hybridize all non-RDA records) (see [section 6.12](#))
- (6XX) at least one subject heading, Montana specific headings highly encouraged (see [sections 6.8](#) and [6.9](#))
- (7XX) added author, when applicable
- (856) electronic location & access (for resources available electronically, with specific attention to the subfield z when access is not for all libraries) (see [section 6.11.1](#))

See Appendix for a MARC tag cheatsheet.

For Permanent Local records

Record standards for these types of records will vary by institution. Instructions for cataloging e-readers are handled specifically in [section 5.6](#). All records must contain a 245 field.

2.2 MARC Record Standard for Temporary Records

Brief records will be handled in depth in [section 5.1](#), ILLs in [section 5.2](#), On-order records in [section 5.3](#), , and CIP record in [section 5.4](#).

On-Order records

The majority of On-order records in the MSC come from vendors and are added in order to track order and fund information in the Acquisitions Module. They often lack appropriate control numbers other than the ISBN but are updated to permanent full records when the item data is added.

For those On-order records not created for use with the Acquisitions Module, it is preferred that staff find a quality record in OCLC. If one cannot be found you may bring in a CIP record. If no record exists for your title you may create a brief title (see section 5.3.1).

For On-Order records loaded from vendors or created using Add Brief Title please use the following tags to aid with matching:

- (010) Library of Congress catalog number (if available)
- (020) ISBN (if available, but only if it applies)(see [section 6.7](#))
- (035) OCLC control number (if available)
- (1XX) author, when applicable
- (245) title, with proper indicators

Because these temporary titles will be updated to permanent records once the items have been received, they will eventually need to conform to the Permanent Full record standards above. For more information about creating, updating, and recognizing On-order records see [section 5.3](#).

2.3 RDA Standards

RDA stands for Resource Description and Access. RDA is the current cataloging standard. Anglo American Cataloging Rules (AACR2) records are now considered legacy records which have been hybridized to

contain RDA elements. MSC catalogers should be familiar with how RDA records look and should not modify or delete any pertinent fields during import or cataloging.

Notable in an RDA record:

- International Standard Bibliographic Description bracketing: 264_1 |a[Washington, D.C.] |b[G.P.O?] |c[2009?]
- International Standard Bibliographic Description end of field punctuation: for fields that require a full stop (such as 245, 250, 300) add punctuation even if it ends in an abbreviation.
- Inaccuracies are transcribed as found.
- In general, do not use abbreviations unless that is how it is found on the source.
- Records no longer use Latin abbreviations such as [sic], [s.n.], [s.l.], [et al.].

MARC	RDA practices
008	Desc should = i
040	b eng e rda
100/110	Addition of relator terms and codes (e.g. e author (or e composer, etc.) 4 aut)
245 a	Change any all CAPS title to sentence case. If title case, accept as is. Inaccuracies are transcribed as is (do not use [sic]). Create 246 with corrected title spellings.
245 h	Obsolete in RDA. OCLC Sunset date for GMDs was 31 March 2016. The CMC recommends that you no longer add GMDs to new records but do not delete GMDs from existing records.
245 c	Transcribe all names as found on source (include qualifying words and phrases); optionally may only transcribe the first name (e.g. John Doe [and six others]). Do not delete names, add if feel appropriate.
250	Transcribe as found; use only abbreviations found in the source.
264 _ 1	Publication statement (formerly 260). Do not use abbreviations unless they appear on resource. Not required to use first place in the "home country;" only first or most prominent required. Publisher name and place always required even if it is [Place of publication not identified] or [publisher not identified].
264 _ 2	New field: distribution statement
264 _ 3	New field: manufacture statement
264 _ 4	New field: copyright statement. use symbol © (e.g. 264 _ 4 : c©2013)
300 a	Generally, do not use abbreviations (spell out "pages"), but do use abbreviations for time (e.g. 1 videodisc (73 min.)) Examples: 1 audio disc; 1 online resource; 3 microfiches; 2 microfilm reels; 5 microscope slides; 1 overhead transparency; 6 cards; 2 videodiscs
300 b	Do not use abbreviations.
300 c	"cm" is a symbol; therefore it is not followed by a period unless there is a 490 field in the record. Do use the abbreviation "in." for discs and other audio carriers.
336 337 338	Content type, media type, and carrier type EXAMPLE for a printed book with text content: 336: text btxt 2rdacontent 337: unmediated bn 2rdamedia 338: volume bnc 2rdacarrier
490	No abbreviations; no rule to substitute Arabic numerals for Roman; convert numbers expressed as words to numerals, including ordinal numbers
700/710	Addition of relator terms and codes (e.g. e contributor (or e illustrator, etc.) 4 cnt)

3. Copy Cataloging

Copy cataloging refers to two actions: attaching your item record to an existing title record in the Montana Shared Catalog; or, downloading/importing a record into the MSC and then attaching your item record. Most cataloging in the MSC is copy cataloging. Take the time to view this [training video](#) before you begin.

Choosing a record

All records added to the MSC through copy-cataloging are considered to be Permanent Full records. Please refer to [section 2.1](#) when choosing the best record for copy cataloging.

If a record for your item exists in the MSC but does not have these minimum fields, import a better record from OCLC if one is available (see [sections 3.2](#) and [3.3](#)). Contact your [mentor](#) or the [MSC staff](#) to combine the records if you do not know how to overlay the old record with the new one.

3.1 Rules for attaching your copy to a record within the MSC

PLEASE NOTE: To avoid duplication, it is the responsibility of each library to thoroughly search the catalog before downloading any new bib records into the MSC. Refer to this [document](#) and [video](#) for tips on setting your properties in Workflows.

Getting started

When using the cataloging module, set searches to “All Libraries”. If a bibliographic record is downloaded that already exists within the catalog, the new record may copy over the existing record. This can remove valuable enhancements that have been made to the bib record, such as series information or reading levels.

When searching for a bibliographic record in the MSC, try to find the title at least two different ways before importing a new record. For example, try a Title or an Author search. Searching by ISBN alone is not ideal because in certain circumstances books with different ISBN numbers can be combined onto one record (see rules below). Search at least once using Keyword search instead of Browse, as not all items are indexed in the Browse search. Keep the time between searching the MSC and downloading the bibs as short as possible to avoid duplicate bib records in the catalog. When choosing between two records for the same item, the preferred record is the Library of Congress record. This record can be identified by the DLC code in the 040 Cataloging Source tag.

035	(Sirsi) o00276976
040	DLC peng erda cDLC dl
020	0397001517 (jacket)

A separate bib record should exist for items with differences in format, content, or responsibility.

This means that if you have a DVD version of a movie, you should not add your holdings to the VHS bib that is already in the system. Electronic items should not be attached to print bib records. New editions of books with updated content should have a new bib record. Items with different translators or narrators should have different bib records.

However, this should be balanced with the desire to reduce the number of records that appear as duplicates from a patron perspective and ensure holds are filled when items with the same content are available. There are times when it is acceptable to add an item to a bib record that is not an exact match. When deciding if an item requires a separate record or a single record, use your judgment and consider the user.

3.1.1 Rules for fiction

You do not need a separate bib for fiction items that are different due to any one of the following:

- Binding (paperback vs. hardcover)
- Publication date
- Publisher
- Page number
- Book Club editions (exact page numbers can be indicated at the item level)
- Book club kits can be on one record regardless of the number of items in kit

You may need a separate bib for fiction items that are different due to:

- Illustrator
- New/different Introduction or Foreword

This is your choice for your own items. If the illustrations, introduction or foreword are a minor part of the book, you may put your items on a bib that does not exactly match the item. You may do this to make it easier for your users to place holds if all of your copies or sharing group copies are on one record. However, do not add your item to a record that lists more features than your item; for example, do not add your record that has no illustrator to a book that has an illustrator listed. Doing so makes it difficult for patrons who want specific content to find what they need.

You do need a separate bib for fiction items that are different due any one of the following:

- Format, i.e. large-type/audio/video/braille/kit/board book
- Special edition or Abridged vs. Unabridged
- Translator

3.1.2 Rules for non-fiction

You may need a separate bib for non-fiction items that are different due to any one of the following:

- Publication date
- Publisher
- Page Number
- Illustrator
- Introduction

You do need a separate bib for non-fiction items that are different due to any one of the following:

- Format
- Edition
- Translator

Note for classics

You may err on the side of attaching to an existing bib if the primary content matches.

Note for print on demand works

Print on demand titles are printed from a master as they are ordered, rather than printed in a traditional run. A print on demand title will often have the current year as a date which may not match an existing bib record. Attach a print on demand title to an existing bib if the only difference is date.

3.1.3 Rules for audio and video

You do need a separate bib for items that are different due to any one of the following:

- The number of items in the set (4 CDs vs. 5 CDs)
- Different format, (Cassette vs. CD, VHS vs. DVD vs. Blu-ray)
- Closed captioned for the hearing impaired
- “This film is described for people who are blind or have low vision”
- Abridged or Unabridged
- Letter box
- Wide Screen or Full Screen
- Special/anniversary edition
- Different special features (has bloopers, or other short extra content)
- Serial publications

3.1.4 Rules for serials, journals, and periodicals

This applies to books published annually or on some other periodic basis, as well as periodicals or magazines. For example, the World Almanac and Book of Facts should have one serial bib and all years should be attached to it instead of a different bib for every year. Holdings for electronic serials should not be attached to bibs for print serials and hyperlinks for electronic access to e-serials should not be added to records for print serials except as a supplement.

You do not need a separate bib for each volume of a serial if:

- The record contains an open-ended date, (2000-)
- Page number is not indicated; instead the fact that there is a more than one volume will be indicated in the 300 field as v. or volume.
- A volume has a separate title this can be indicated in a 505 content note tag. Content notes are searchable.

You do need a new bib for a serial if the title of serial changes within the first five words. If this happens:

1. The date of the original record should be “closed,” giving the year of the last date published under the old title, i.e. 2000-2003
2. If the number of volumes published under the old title is known it may be indicated in the 300 tag, i.e. 10 v.
3. A 785-succeeding note should be added giving the new title.

More information about cataloging serials and periodicals can be found in [section 7](#) of this manual.

3.1.5 Rules for other materials

Downloadable eBook and audiobook titles should have their own bib records. Do not add 856 tags for electronic items to print bib records and do not add items for electronic materials to bibliographic records for print items. See [section 6.11.1](#) for standards pertaining to electronic holdings.

Other sections of this manual explain rules for interlibrary loans ([section 5.2](#)), books kits ([section 5.5](#)), and eReaders ([section 5.6](#)). For all other items, contact your [mentor](#) or the [MSC staff](#) for help.

3.2 Importing records not already in the MSC

If you cannot find a record for your item in the MSC do not create an original record in WorkFlows. If an item does not exist in the Montana Shared Catalog, then the item can be imported from OCLC. Before importing a new record, make sure that a similar bibliographic record does not exist; similar items can often be combined onto one bib. See [section 3.1](#) for more detail on what formats and items can be combined on the same record.

If the only record you find in the MSC is a brief or very poor record that does not conform to the standards in [section 2](#), bring in a better record from OCLC by overlaying the brief record (preferred way) or bring in a new record and transfer the items from the brief record to the full record. If you need assistance with this, contact your [mentor](#) or the [MSC staff](#). Transferring directions can be found in [section 8.1](#) of this manual.

Records can be imported into the catalog in two ways: batch bib load or using the SmartPort wizard in WorkFlows. Most libraries use SmartPort for importing records. Instructions for using SmartPort can be found in the next section. If you are interested in batch loading, [open a ticket](#) with MSC staff. System Administrators will create a template that your library can use for doing a batch bib load and provide you with instructions.

3.3 Importing records from OCLC using SmartPort

Individual records can be imported directly into the MSC from OCLC, the Library of Congress, or other select libraries through the Z39.50 portal SmartPort. Follow these instructions to bring new records into the MSC and take time to view the [training video](#).

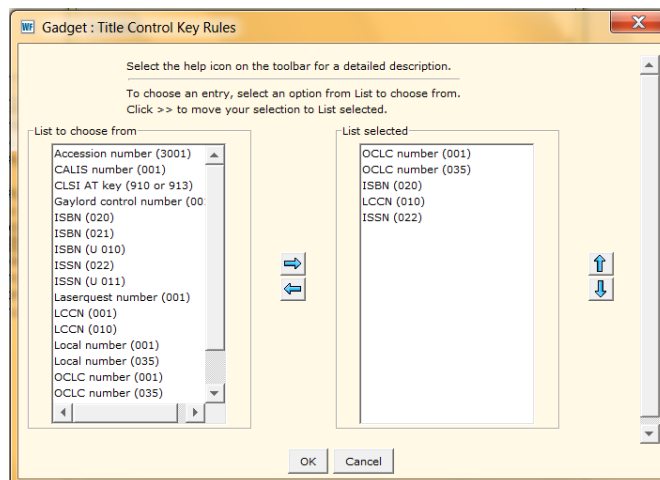
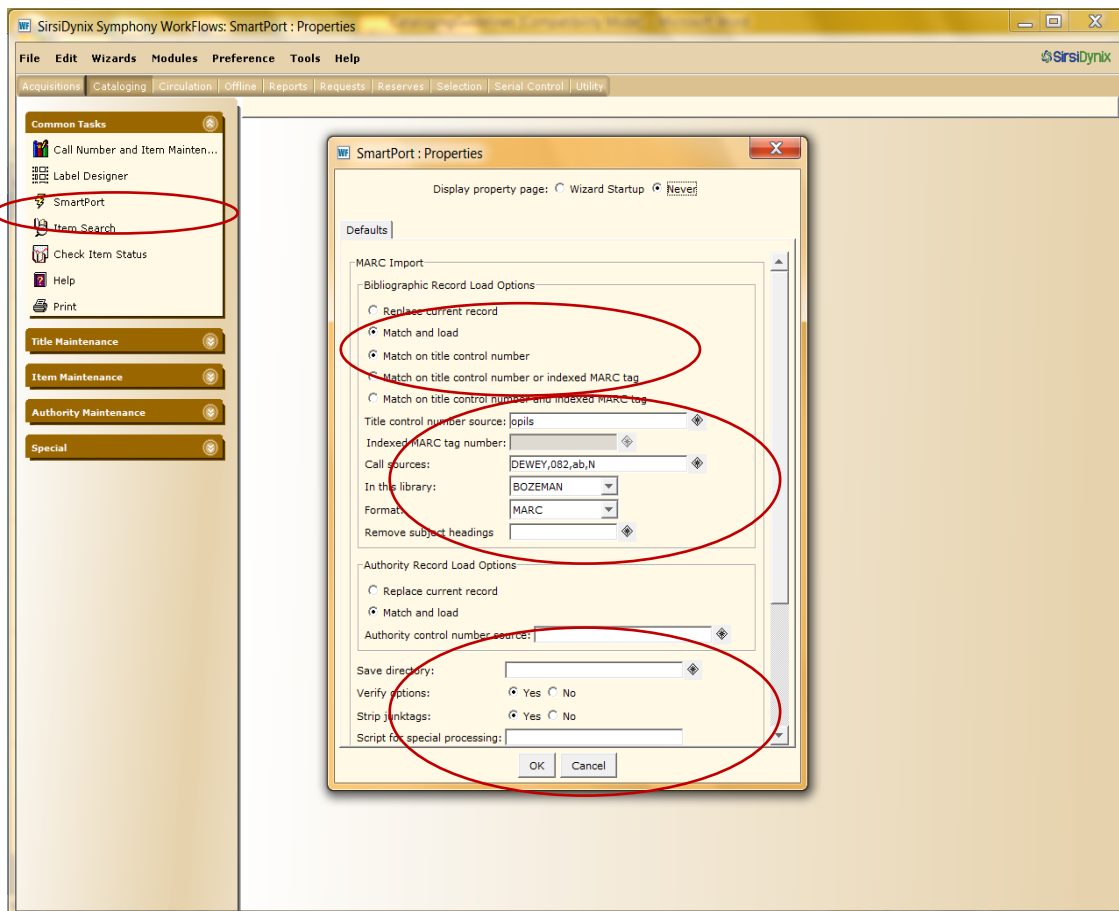
3.3.1 Selecting records for download

Library of Congress records (identified by a DLC in the 040 tag) are the preferred records for the MSC. CIP (brief records from DLC based on publisher galleys) may be brought into the catalog, but will need to be updated. Please see [section 5.4](#) for instructions on updating CIP records.

3.3.2 Setting up SmartPort properties

Confirm the default properties settings before you import records. These settings determine match points (OCLC number, ISBN, etc.) from the record to ensure that records aren't duplicated. They also determine which call number information will be selected from the bib for your local item. To set up or change your default settings:

1. Right click on the SmartPort wizard and select Properties.
2. ALWAYS select Match and Load as your default.
3. Select Match on title control number.
4. For title control number source, click the diamond-shaped gadget to see the selection list. Always select OCLC number (001), followed by OCLC number (035). This order is necessary to prevent duplicate records. After OCLC numbers 001 and 035, you can select ISBN, LCCN, ISSN numbers, etc. as you wish. The OCLC matchpoints display as "opils" or another series of letters on the default screen (pictured below).
5. For call source, preferences will vary depending on local call number practices. If you are a Dewey library, choose DEWEY from the Classification field and 082 in the Entry ID field. Once your preferences are established, click Add, and then OK. You can establish more than one setting.
6. For Library, choose your library Format: Generally MARC, but you can select other options if needed.
7. For strip junktags, choose YES.
8. Leave all other fields as they are.



3.3.3 Find and add records with SmartPort

1. Search entire MSC collection to determine whether or not the item already exists in the catalog. You must search at least twice, with at least one search using Keyword; not all items show up in Browse and Exact searches.
2. Go to the SmartPort wizard listed under the Common Tasks tab.
3. Select system(s) to search (typically OCLC) and click Connect.
4. For OCLC, you will be asked for Input authentication. Use your library's OCLC login in the format shown below. It is the same as your login to OCLC Connexion.

OCLCauthorization/OCLCpassword (not case sensitive)

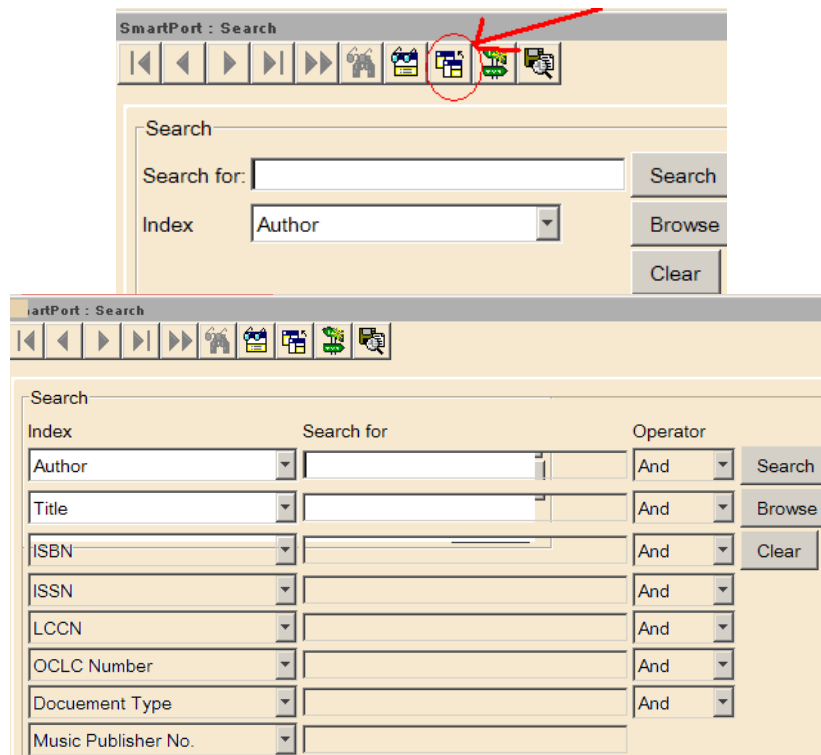
5. Once in, you may search by author, title, ISBN, OCLC number or other indexes.
6. Use navigation arrows at the top to move through search results.
7. When you find a record that looks correct, click Display to view the full record and verify the bibliographic description. Select the most appropriate record; records created by the Library of Congress are preferred (look for DLC in the 040/Cataloging Source field).
8. Select Capture on desired record. You will see a screen displaying your load settings. Double-check your properties and select OK if properties are correct (see [section 3.3.2](#))
9. In most cases you will see the full MARC record to be loaded at this point. When using SmartPort to import a new record, consider enhancing the record to make it more useful to librarians and patrons. [Section 6](#) of this manual covers the most common ways to enhance records, including [series statements](#), [reading and interest levels](#), and [subject headings](#). You can also update CIP records at this point (see [section 5.4](#)). When finished, select Save.
10. If you get message that the title was found in MSC:
 - Note the matching title control # and click OK.
 - Keeping SmartPort open, open another tab for Call Number and Item Maintenance and search for the duplicate record using the Title Control #.
 - If the record is a match and the original record is better/enhanced, return to SmartPort and select Close. A message will ask you if you want to save this record to the database: say NO.
 - If the record is a match AND: you are confident that the new record is better, and that there were no pertinent enhancements made to the original record that would be lost, select Save.
11. You may receive an error that a unique call number is needed. If necessary, type AUTO in the space provided to assign an XX, or system-generated, call number. This can be edited later in Call Number and Item Maintenance after the item has been added.
12. If you open Call Number and Item Maintenance directly after adding a record, the link to that record will appear as the last record used; this allows you to save time by not re-searching for the record.
13. SmartPort brings in a call number when a record is imported, so you do not need to add a Call Number and Item. Instead, choose Add Item. Enter item information as you would with copy cataloging within the MSC and be sure to change the call number if it was system-generated.
14. Select Save.

3.3.4 SmartPort search tips

- Search or Browse by Author: Search in Last name first name (no comma) format
- Search or Browse by Title: Begin with first significant word; if search results in error "Invalid Search Expression Near" put title in quotations marks
- Search or Browse by ISBN: Omit hyphens
- Search or Browse by ISSN: Include hyphen
- Search or Browse by LCCN: Omit hyphen
- Search or Browse by OCLC: Digits only, omit "ocm"

3.3.5 Advanced search option in SmartPort

If a simple search returns too many results it is possible to narrow the search using the advanced search option in SmartPort. Select the Change Search View Pane icon at the top of the screen. It allows you to search by more than one index at a time. Click the icon again to return to simple search.



Search by Document Type: Use these codes in combination with other search options:

bks - Books

com - Computer Files/Electronic Resource

map - Maps

mix - Mixed Materials

rec - Sound Recording

sco - Musical Score

ser - Serials

vis - Visual Material

3.4 Getting started with vendor-supplied records

Using vendor-supplied MARC records for purchased items can save time and effort while cataloging. It requires some initial set up and work with the vendor to get MARC records that meet MSC standards as outlined in [section 2](#). Due to concerns about the quality of vendor records, member libraries may not import vendor-supplied records without first contacting the MSC Admins. You must also get in touch with the vendor to ensure that your specifications and the quality of MARC records measure up to MSC standards. Once you have begun this process MSC Admins will provide you with detailed, step-by-step instructions on how to proceed.

The majority of records for electronic materials are also purchased from vendors. In addition to the other standards for full permanent records in the MSC, special attention must be paid to the subfield z of the 856 tag in order to ensure proper access is described for patrons. See [section 6.11.3](#) for more information.

Loading records

MARC Records from the vendor can be batch loaded in the same manner as records from any other source. MSC Admins will build a bibload report template for loading records. This ensures that the records match existing records properly and that the copy information from the 949 tag creates the copies correctly.

For vendor records containing hyperlinks, random checking should also determine the accuracy of hyperlinks in accordance with the hyperlink maintenance guidelines in [section 6.11.2](#). If hyperlinks

coming from the vendor are broken please report the broken links directly to them and request new records with corrected links to reload.

Checking the results of newly created bib records

MSC Admin will create a report template that will identify newly created bib records. Run this report after the vendor bibload process is complete. Once the first batch of records is imported, it is important to spot-check the newly created items for accuracy. A random check of one-fourth of the imported records is recommended. If there are errors, work with the MSC Admins and the vendor to adjust the settings. Repeat this process with every order until the import process works correctly.

3.5 Batch bib loading

Records from OCLC and other vendors can be imported into the MSC in batch via the batch load process. If you are interested in batch loading, contact the [MSC staff](#); System Administrators will create a template that your library can use for doing a batch bibload. Once a template has been created for you, MSC Admins will provide you with batch bib loading instructions.

4. Managing Call Numbers & Item Records

This section includes issues related to creating call numbers and item records. Item types and home locations can affect how an item circulates as well as identify what and where the item is. Call numbers work together with these settings to guide patrons and others in finding materials in the library. This section will help you choose and manage the settings for your library.

4.1 Call Number and Item Record Overview

You can create and modify item records in Call Number and Item Maintenance. This is where you can change the settings for individual items, including the Item Type and Home Location. There are three main sections to an item record.

- Call Number Information
 - Call Number – tells staff and patrons where an item is shelved
 - Class Scheme – the type of call number
 - Call Library – owning library
 - Shelving Key – displays call number with leading zeros displayed
 - Shadow Call Number – shadows every item under this call number
- Item information
 - Item ID – item's unique identifier, usually its barcode
 - Copy Number – this auto increments, and doesn't change if earlier copy is deleted, can be changed manually
 - [Item Type](#) – determines how item will circulate, including: loan period, fine structure, renewal limits, number of item limits, holdable status
 - Item Library – owning library
 - [Home Location](#) – physical location of item, holdable status
 - Current Location – non-editable display field of item
 - Item Categories 1 – 5. Descriptive fields that mostly serve as a hook for statistical purposes. These are entirely optional, libraries do not need to use Item Categories.
 - [Recommended Uses for Item Categories](#).
 - Item Category 1, [approved list](#).

- Publics, Schools & Academics: Format, Equipment Type & Realia (Realia is non-media, like lifejackets)
- Specials: Special use as needed
- Recommended for Public libraries wishing to have their Public Library Statistics run centrally by MSC Admin and loaded into the Directory
- Item Category 2, [approved list](#) & [select list for Specials & Academics](#).
 - Publics & Schools: Adult/Juvenile/YA
 - Academics: Student-Use/Faculty-Use
 - Specials: Department/Organization
 - Recommended for Public libraries wishing to have their Public Library Statistics run centrally by MSC Admin and loaded into the Directory
- Item Category 3, [approved list](#).
 - All libraries: Subject, Genre, Fiction/Non-Fiction, Music Category, Language Material Designation
- Item Category 4, [approved list](#) & [select list for Schools](#).
 - Publics & Schools: Reading/Interest Levels, HILO & Movie Ratings
 - Academic & Special: HILO, Movie Ratings & Special use as needed
- Item Category 5, [approved list](#).
 - All libraries: Funding Source/Origin (such as donation, gift, grant, etc.), Subscriptions, E-Book Source
- Media Desk – related to Materials Booking
- Number of Pieces – if set to more than 1, requires override to check in or out (generally used for items like books on cd, etc.)
- Total Charges – how many times an item has checked out, editing does not affect circulation statistics
- Price – for replacement charges for lost items, collection value
- Permanent – checked by default, if item is not meant to be permanent, add Brief Title instead
- Circulate – checked by default, allows circ rule to be overridden, unchecking will not prevent circulation
- Shadow Item – shadow a single item in the public catalog; visible in workflows using keyword search
- Extended Information
 - CircNote – display at checkin and checkout
 - Public – display in eLibrary
 - Staff – displays in Workflows only

4.2 Choosing Item Types, Home Locations & Item Categories (policies & policy types)

Within WorkFlows, libraries assign policies from specific policy types in order to label items for internal statistical purposes and control how those items circulate. Each policy type is made up of a list of approved policies. For example, STACKS is a policy of the policy type Home Location. The policy types have a specific scope of application that does not change. Policies within those policy types are based on approved criteria and the needs of member libraries.

As mentioned above, Item Type governs the circulation of the item, Home Location describes the place the item is shelved and may be holdable/non-holdable or shadowed/unshadowed by configuration.

“Shadowed” means that the item is not visible in the patron catalog. The Item Categories are fields that allow various classifications for statistical, reporting, and cataloging purposes. They provide ways of grouping items that make it easier to get lists and statistics for those groups and can also be used as criteria for making batch changes. All policies correspond to a facet in Enterprise. Though these policy types are completely optional, inconsistent application of policies can be confusing to patrons trying to use the facet options. Each Item Category has a specific recommended use, mentioned [above](#).

It is important to apply these policies consistently at your library or items will not circulate properly, may be difficult for patrons to find, and may not provide accurate statistics. MSC Admin and the CMC recommend that policies be limited to only those being used at your library. It is also recommended that your library construct a table detailing which policies should be applied to which types of items. These tables can be very helpful in training new cataloging staff or in event of staff turnover. If you are interested in having MSC Admin send you a list of your current policies, or in having your policies limited, please [open a ticket](#).

Below is an example table that could be used by staff to consistently apply policies in WorkFlows and assign call numbers.

Description	Item Type	Home Location	Item Cat1	Item Cat2	Item Cat3	Item Cat4	Item Cat5	Call number
Reference	NON-CIRC	RERERENCE	BOOK		REFERENCE			REF 035
Circulating magazines	CIRC-MAG	MAG-PER						MAGAZINES
Adult Fiction	BOOK	FICTION	BOOK	ADULT	FICTION			F SMITH
DVD Docu-mentaries	AV	AV-GENERAL	DVD		NON-FICT			DVD 917
Music CDs	AV	MUSIC-CD	CD	ADULT	JAZZ			MCD 781
Juvenile easy readers	BOOK	JUVENILE	BOOK	EASY	FICTION	AR-1_2		E SEUSS
eBooks	DIG-BOOK	ONLINE	EBOOK	ADULT			OVERDRIVE	ONLINE
YA Graphics	BOOK	GRAPH-NOV	GRAPHIC	YA	FICTION			GN TAKAYA V. 15
E-readers	MEDIA-EQUIP	AV-GENERAL	E-READER	ADULT			DONATION	

5. Creating Temporary & Permanent Local Records

There may be some titles that you cannot find a matching record for within the MSC or OCLC. There are two different ways to deal with these titles. You can do original cataloging in OCLC Connexion or you can add a Brief Title in the MSC. Please consider that the goal of the MSC is to have OCLC-level records for all permanent records in the catalog. To determine which action is appropriate, please read through section 5. If you need further assistance, contact your [cataloging mentor](#).

5.1 Creating Brief Titles

Brief Titles are intended to be temporary records in the MSC. Holdings for brief records are not added to OCLC and therefore should not be used for permanent holdings. The Add Brief Title Wizard is in the circulation module so that circ staff can create Brief Titles at the time of check out for those items that

do not have records but need to circulate. These titles have a unique format of BRIEF rather than MARC so they can be identified easily.

When the Add Brief Title wizard is selected (located under the Circulation Module's Items tab) a template will appear which should be filled in as completely as possible. The BRIEF template includes only the 020, 100 and 245 fields, however only the 245 is required.

These titles have a home location of CATALOGING by default so that when the materials are discharged they can be routed to the cataloging department for proper cataloging. Brief Titles should be removed, transferred to a permanent bib record, or overlaid by a new record as soon as possible. See [section 8.2.3](#) for instructions on deleting bib records and [section 8.1](#) for transferring.

The Add Brief Title Wizard can also be used to create permanent local records (see [section 5.7](#)), but should not be used to create records simply because a suitable bib is not currently available in the MSC. For permanent bibliographic records, follow the guidelines in [section 2](#).

5.2 Temporary Interlibrary loan records

When receiving ILL materials from lending libraries you must make a temporary record in the MSC. You must do this even if the lending library is another MSC library. If the item comes from another MSC library do not scan the item's barcode. This will put the item into transit and causes circulation issues for the lending library when the item is returned. Please follow these guidelines when creating temporary records for interlibrary loans:

5.2.1 Settings for incoming ILLs

- Create a brief record using the Add Brief Title wizard (see [section 5.1](#))—do not attach to an existing record within the MSC or import a record for your ILL title. Be sure to enter the title information in the 245 in ALL CAPS.
- Shadow the item so that it does not appear in the OPAC. You can do this in Add Brief Title Properties, or after you have created the item in Call Number in Item Maintenance. To reach the properties, right click on the Add Brief Title wizard.
- Use the Item Type ILL-MAT.
- Use one of the following Home Locations: ILL-IN, ILL-IN-MT, and ILL-IN-OOS. Use ILL-IN-MT and ILL-IN-OOS if you would like to track items borrowed from Montana libraries and out of state libraries separately.

5.2.2 ILL titles

- As with other brief records, the title should be IN ALL CAPS. This helps other libraries to immediately recognize the record as a brief title.
- Type ILL before the title. For example, ILL FACEBOOK FOR DUMMIES. This allows you to search by title for your ILLs and differentiate between ILLs and other brief records.

5.2.3 Delete ILL records

- When the ILL is returned, delete the record. To do this, use the Delete Title, Call Number or Items wizard on the Items toolbar in Circulation, see [section 8.2.3](#) for more information.
- If the wizard will not let you delete the entire title, right click on Delete Title, Call Numbers or Items and select Properties. On the behavior tab, check the box for "Delete title when deleting last call number or last item" and then click OK. You will now be able to remove the entire record, including title, call number, and item.

5.3 Recognizing and creating On-order records

Most On-order records in the MSC correspond to items that are being managed in the Acquisitions Module. These records are updated to permanent record quality through the Acquisitions process and any holdings added to them will be on the full bib record. Unless you ordered your copy through Acquisitions you are not required to update these records but are encouraged to bring in records from OCLC of full permanent quality when they become available. Contact your [mentor](#) or the [MSC staff](#) if you do not know how to overlay the old record with the new one. It is most important to understand that though these records appear to be of poor quality you should still add your On-order copies to them to avoid duplicate records being created when the permanent bib record comes in.

Examples of On-order records created using the Acquisitions Module:

The image shows a MARC record and its corresponding item record data. The MARC record is displayed in a text-based format with fields numbered 000 through 999. Key fields include:

- 000: *****am *******is*******
- 001: BK0016413060
- 005: 20150826133014.0
- 008: 150825s2015 nyu 000*1 eng d
- 010: bl2015034392
- 020: 9780062325891
- 037: |bHarpercollins, 53 Glenmaura National Blvd Ste 300, Moosaic, PA, USA, 18507-2132|nSAN 200-2086
- 040: NjBwBT|beng|cNjBwBT|erda
- 050: 14 PS3558.I224|bC37 2015
- 082: 00 813/.54|223
- 092: 813.5400
- 100: 1 Hickam, Homer H.,|d1943-|eauthor.
- 245: 10 Carrying Albert home :|bthe somewhat true story of a man, his wife, and her alligator /|cHomer H. Hickam.
- 264: 1 New York :|bWilliam Morrow,|c2015.
- 300: **pages cm**
- 336: text|2rdacontent
- 337: unmediated|2rdamedia
- 338: volume|2rdacarrier
- 650: 0 Alligators as pets|vFiction.
- 650: 0 Married people|vFiction.
- 650: 0 Voyages and travels|vFiction.
- 596: FCL-MAIN BILLINGS
- 947**: |bPARMLY|fAFIC|hPBLFICNEW|i9780062325891|p25.99|q1
- 999: |hPBLFICNEW

Below the MARC record, the 'Item record data' is shown in a table-like interface. The 'Control' tab is selected, showing the following information:

Control	Bibliographic	MARC Holdings	Call Number/Item	Bound-with	Orders	Serials Ctrl	Selections
Carrying Albert home : the somewhat true story of ;				Call Number: Holds			
XX(2272811.1) - FCL-MAIN				Call number information			
XX(2272811.2) - BILLINGS				Call number: XX(2272811.1) Class scheme: ONORDER			
				Call library: FCL-MAIN			

Note that this On-order record contains no page numbers or size in the 300 field, the encoding level in the leader is "8," it only has an ISBN as a control number for matching, and it contains order information in the 947 field. In the item information, you will see that there are only call number records and the class scheme is ONORDER.

On-order records should not be confused with Cataloging in Publication (CIP) records (see [section 5.4](#)).

5.3.1 On-Order records created without Acquisitions Module

You do not need to use the Acquisitions module to create your own On-order records. The preferred method of adding On-Order records is to attach your copy to an existing Acquisitions bib for new items, or to a full permanent bib record for replacement titles. If you are unable to find either of these two types of records you may need to create your own On-order record using the Add Brief Title wizard. Use the Class Scheme ONORDER, Home Location CATALOGING or AVAIL_SOON. Follow the record standards for temporary records detailed in [section 2.2](#).

If you do create your own On-Order record, once the item has been received, you will need to update the record to full permanent record standards as detailed in [section 2](#). You can also update the record by transferring the item to a permanent bib record ([section 8.1](#)), or by overlaying the temporary bib with a new record.

5.3.2 Honoring Release/Street dates for new materials

Please keep in mind that new materials should **NEVER** be made available or circulate to patrons before the specified release date. Publishers allow distributors and libraries to receive materials in advance as a courtesy to allow time for processing. Check the packaging slips from major vendors as they indicate the street date for time sensitive releases. You may catalog and process new releases in advance, but be mindful about street dates and do not allow patron to access these materials until the official release date.

Checking items out before the release date violates legal agreements and can jeopardize this privilege for all libraries.

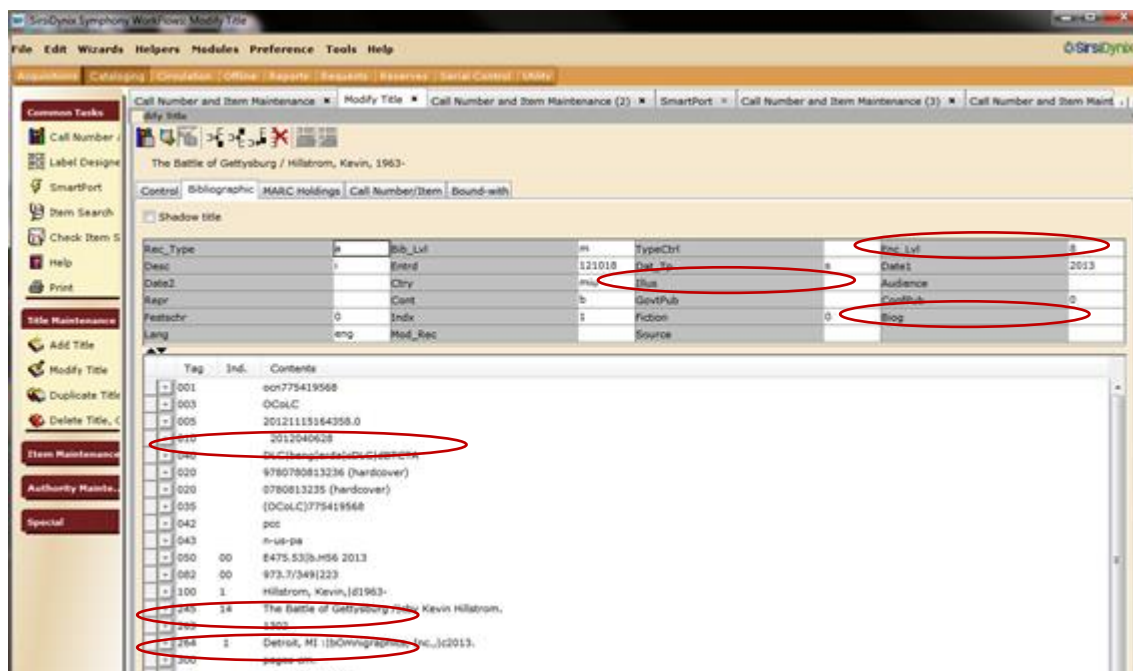
5.4 Updating CIP records

CIP stands for Cataloging in Publication. CIP records are created by the Library of Congress before a book is published. CIP records need to be updated to include information such as number of pages and size. A publisher may change the layout or content of a title page so title information may need to be updated. CIP records are considered temporary bibliographic records in the MSC and need to be updated once the title has been published in order to conform to permanent records standards discussed in [section 2](#).

5.4.1 Recognizing CIP Records

- Encoding Level 8 in the fixed fields
- 040 field has |a DLC |c DLC to denote Library of Congress
- 300 field lacking physical description
- 263 field with a projected publication date

CIP Record:



5.4.2 Editing CIP records

To edit a CIP record in Workflows, select Modify Title listed under the Title Maintenance tab and then search for the record that needs to be updated. Click Modify. Click Save when finished editing. You may also edit a CIP record in OCLC before bringing it into the system. For help in how to edit in OCLC contact your mentor.

As a minimum, check the following fields and edit as necessary:

Fixed Fields (008) table at the top of the record

- Change the Enc_Lvl from 8 to K
- If the book is illustrated, change Illus: from blank to “a” for illustrations. Add b if there are maps.
- Check the date in Date 1, change if necessary
- Check Indx:, if there is an index, supply 1
- Check Biog: a= Autobiography, b=Biography, c=Collected Biography, d=Some biographical material is included

Title (245 tag)

- Check subfields a and b (title and subtitle). They should match the title page exactly except for capitalization. In the bib record, only the first letter of the title and proper nouns should be capitalized. Do not abbreviate any words that are not actually abbreviated on the item.
- Check subfield c (statement of responsibility). It should match the title page. Records may include one, some, or all authors and additional information.

Publishing information (260 or 264 tag)

- If you changed the Date 1 field in the 008, you must also change the date in the 260 or 264 tag.
- Some legacy records may have a 260 tag. These should be changed to 264 tags, as below.

EXAMPLE: 260 __ |a New York : |b Kingfisher, |c 2013.

- Most records will have a 264 or series of 264 tags. The first indicator is blank and the second indicator determines the type of statement. The most common 264 tag in CIP records will be the Publication Statement, or a 264 with a second indicator 1.

EXAMPLE: 264 _1 |a Westport Connecticut : |b Libraries Unlimited, |c [1999]

- If a record contains unidentified information in subfields a, b, or c of a 264 _1 tag, then a 264 with second indicator 2 is required. This will be rare in a CIP record.

EXAMPLE:

264 _1 |a Idaho : |b [publisher not identified], |c 1962.

264 _2 |a Caldwell, Idaho : |b Idaho Distributing Co.

- RDA records may have a 264 with a second indicator 4 explicitly showing copyright date.

EXAMPLE:

264 _1 |a New York : |b Nancy Paulsen Books, |c [2013]

264 _4 |c ©2013

Projected Date of Publication (263 tag)

- Delete the 263 tag.

Physical description (300 tag)

- Edit subfield a (extent): Enter the number of pages according to RDA standards, with no abbreviations. Input as 26 pages, or 32 leaves.
- Edit subfield b (illustrations &/or maps): When the item has illustrations, maps, etc., fill in the information according to standard, with no abbreviations.
- Subfield c (size in cm): Height is measured in centimeters (always round up). If the book is shorter than it is wide, measure both height and width (21 x 26 cm).

EXAMPLE:

300 __ |a 265 pages : |b illustrations ; |c 28 cm

Bibliographical notes (504 tag)

Sometimes page numbers are left out in the CIP record; complete the information. Do not abbreviate.

EXAMPLES:

504 __ Includes bibliographical references (pages 389-412) and index.

504 __ Filmography: pages 97-98.

Scan entire record for typos or other incomplete or missing information.

5.5 Cataloging book club kits

Records for book club kits are considered permanent local records in the MSC. Book kits should have their own record, separate from the record for the book itself. Kits can share the same bibliographic record regardless of individual library kit contents. Local information about specific kit contents can be entered in note fields at the item level.

To create a new book club kit:

If a record for the title already exists in the MSC, you can create a new duplicate record and modify that. If there is no record for your kit's title in the catalog, you will first need to import a record from OCLC (see [section 3.3](#)).

1. Select Duplicate Title wizard, located in the Title Maintenance toolbar in Cataloging.
2. Search for the title you wish to create a kit record for. Click Duplicate.
3. You will see the MARC record for the duplicated record. **Please be sure to determine you are editing the duplicate record and not the original.** Make the following changes to this record:
 - a. Insert a 007 field for kit.

EXAMPLE:

007 __ o

- b. Leave the physical description (300) tag as it is.
 - c. Add the following series tag: 490 __ 0 Book club kit
 - d. Add the following subject tag: 653 __ Book group discussion kits.
 - e. Delete OCLC tag (001).
 - f. Delete OCLC tag (035).
 - g. Delete any ISBNs (020).
4. Click Save when you are finished.
 5. Add your call numbers and item(s).

5.6 Cataloging eReaders

When cataloging eReaders with preloaded content you will need to modify the properties of Add Brief Title in order to have all the required fields available to you. Be sure to Select EQUIP for the Format and

Use Entries to BRIEF. You will need to check the “Permanent” box and configure the other fields as needed for your library, with the exception of Item Type, which should be set to MEDIA-EQUIP.

The screenshot shows a window titled "Add Brief Title: Set Properties". At the top, there are radio buttons for "Display property page: Wizard Startup" and "Never", with "Never" selected. Below this are two tabs: "Behavior" and "Defaults", with "Behavior" active. The "Behavior" tab contains several settings: "Format" is set to "EQUIP", "Use entries" is set to "BRIEF", "Shadow title" is checked, "Permanent" is checked, "Circulate" is checked, "Type" is set to "MEDIA-EQUIP", "In this library" is set to "MT-DOT", "Home location" is set to "AV-GENERAL", and "Class scheme" is set to "AUTO". Below these are five "Optional Fields" labeled "Item cat1" through "Item cat5", each with a dropdown menu. At the bottom right are "OK" and "Cancel" buttons.

Below is a list of **required** fields. Remember that you are cataloging the device first and then the titles on it. You want the device to be searchable by the titles loaded onto, but it should be clear that the item is a device with pre-loaded content.

Tag	Indicators		Contents
245	0	0	Ereader b <i>optional</i> [b subfield can be used to reflect content or local library preference] e.g. Ereader bNonfiction, Fiction, Elementary level, etc.
246	3		Brand name of device. [Added title : repeatable for multiple variations such as Nook, Kindle, etc.]
300			1 electronic book reader [can use subfield e to include chargers, headphones, etc.]
336			text btxt 2rdacontent
337			unmediated bn 2rdamedia
338			object bnr 2rdacarrier
500			This device is provided as READ ONLY. Do not alter content or use as a wireless device. <i>Optional</i> if the reader has preloaded contents that should be protected
505	0		Contents. [Use a Title / Author -- Title / Author format] * Be sure to omit definite articles such as [a, an, the]
650		0	Electronic book readers.

Item Type - use MEDIA-EQUIP. Home location & Item cats – use local practices

* If desired, a formatted 505 contents field can be constructed using subfields t and r and g (title and responsibility and miscellaneous information). No spaces between the subfield and data. When entering titles please omit articles such as “a, an, the.”

EXAMPLE:

505 00 |t Mirror /|r J.D. Robb --|t Once Lucky Vampire /|r Lynsay Sands.

Device information such as Model and Serial # should be placed in the staff notes field of the holdings page for inventory control and identification. Miscellaneous information in |g may include volume, part, page numbering or other extent information such as dates and duration.

EXAMPLE:

505 00 |t Quatrain II|g (16:35) --|t Water ways |g (1:57) --|t Waves|g (10:49).

5.7 Creating permanent bibliographic records/adding titles in WorkFlows

For permanent local records that are not eReaders or Book club kits you will need to use your judgement. Most equipment (e.g. TVs, cameras, DVD players) can be cataloged using the same template and procedure outlined for eReaders in [section 5.6](#). In most other cases using the Add Brief Title wizard to catalog an item as described in [section 5.1](#) will be adequate. If neither of these templates contains the appropriate tags for your permanent local item you may use the Add Title Wizard to create a record from scratch.

Please keep in mind that the preferred method for adding original items to the MSC is to create unique records in OCLC using Connexion. Records can then be imported into the MSC using SmartPort or batch bibloading. If you are unfamiliar with creating records in OCLC contact your [cataloging mentor](#) for advice.

OCLC uploading

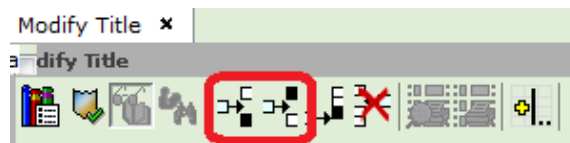
The MSC automatically uploads item additions and discards to OCLC monthly. Extracting additions and discards takes place early each calendar month through a report and extraction process done by system administrators. The process creates a file of all items with a Home Location of DISCARD and a file of all items newly created in the previous month. OCLC receives the files electronically. Based on the translation table established for the MSC, OCLC sets and deletes MSC library holdings on OCLC bibliographic records. The OCLC upload process updates MSC library OCLC holdings. It does not include creating bibliographic (title) records in OCLC. In order to create unique title records in OCLC, libraries are advised to use OCLC Connexion.

6. Modifying, Editing & Improving Bibliographic Records

You may enhance records in the catalog, as well as those that have just been imported. Remember that anything added to the bib record should reflect the whole title, and not just your specific library's copy. Anything that is specific to your copy can be added at the item level.

Suggested enhancements include: series information, additional subject headings, 007, varying forms of title, content notes, and other notes.

To modify a title, go to Modify Title in the Title Maintenance toolbar in Cataloging. Use either of these two icons to insert a new row either above or below and existing one.



These icons are also available to edit the bib record during the capture phase in SmartPort (see [section 3.3](#)).

6.1 Varying forms of the title (246)

You may need to add a varying title if:

- There is an “&” or other abbreviation in the first 5 words of the title make sure there is a 246 tracing with “and” or other abbreviation spelled out. If the 245 is “Beauty & the beast” there should be a 246 of “Beauty and the beast”.
- There are abbreviations. The title “Adventures of Dr. Brown” should have a 246 of “Adventures of Doctor Brown”.
- There is a number in numerals in the first 5 words then make sure there is a 246 tracing with the number spelled out. If the 245 is “40 days and nights” there should be a 246 of “Forty days and nights”.

6.2 Large Print

If you have large print items in your collection, add a 007 field, as follows:

007 __ tb

You will also need to add a subject heading 650 tag of Large type books. The first indicator is blank and the second is a zero.

EXAMPLE: 650 _0 Large type books.

6.3 Edition statement (250)

Edition statements, which describe or differentiate between materials of the same title, should be added when noted on the item. Also add edition statements when applicable, as in the following examples:

Description	250 Examples
Blu-ray discs	Blu-ray edition
Print and audio abridged versions	Abridged edition
Board books	Board book edition
Big books (storytelling/classroom editions)	Big book edition
Foreign language versions	Spanish language edition
Large print	Large print edition

6.4 Series statements

Series tags can be used to link monographic serials published under separate titles. There are different ways to do this including using a 490 tag, or a combination of 490 and 800/830 tags. You will also find old examples of 440 tags in the catalog but the 440 tag is now obsolete so do not use it. The 490 tag should have the series as it is listed on the item.

Most series titles are traced. This means that series statements in the 490 correspond to a uniform series title in the 800/830 field. Untraced series are more generic titles that are not traced because it is unlikely that a user will need to find all the titles in the series. To distinguish between traced and untraced series you must apply the 1st indicator. Traced series need a 1 and untraced need a 0.

Traced series [EXAMPLES](#):

490 1_ Percy Jackson & the Olympians ;|v bk. 1

800 1_ Riordan, Rick.|t Percy Jackson & the Olympians ;|v bk. 1. *800 is used since all of the books in the series are by one author. The author's name goes first. The form of the author's name should be the same as in the 100 field.*

490 1_ 39 clues ;|v bk. 7

830 0_ 39 clues. *830 is used since the series is written by more than one author.*

Untraced series EXAMPLE:

490 0_ Pelican books *This series is untraced because it is a fairly generic series title and it is unlikely that anyone would want to look it up by the title.*

Recommendations for series

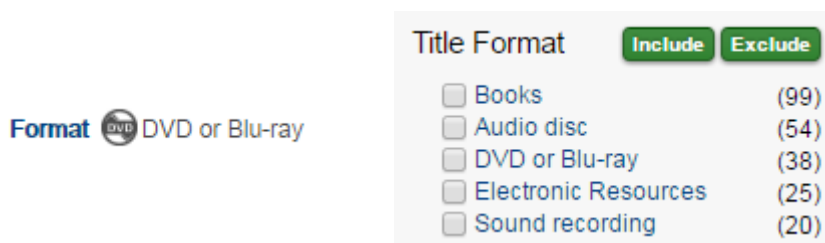
- Use the same tags consistently throughout the series. For examples of proper formatting for each of these tags, see [OCLC Bib Formats](#).
- All titles in a series should use the same form of the 800 tag with only the volume number being different.
- If a series tag needs to be modified to match the rest of the series, copy and paste the series statement from an existing record, editing the volume number as needed.
- Series tags may be added to titles in a series even if no 4xx tags exist. Use 490 tags to add a series in this case. If there is a volume number put it in subfield v.

For information about how to handle series call numbers, see [section 7](#).

6.5 007 tag/Physical Characteristics fixed field

Use MARC tag 007 to code the physical characteristics of an item (e.g. electronic resource, globe, motion picture, sound recording, kit, map, video recording, microform, tactile material, notated music, text, etc.) Regular books, realia and most equipment do not need 007 fields.

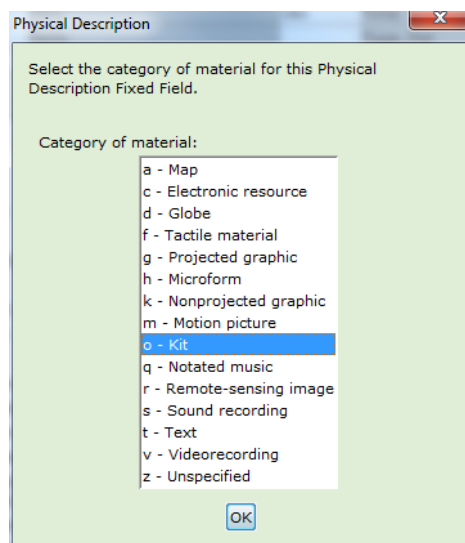
Enterprise uses the first two bytes (characters) of the 007 to determine the display icon for Format and to determine the options in the Title Format facet. The 007 is not needed for equipment or regular monographs. The facets and icons for these are determined from the Leader.



Title Format		Include	Exclude
<input type="checkbox"/>	Books	(99)	
<input type="checkbox"/>	Audio disc	(54)	
<input type="checkbox"/>	DVD or Blu-ray	(38)	
<input type="checkbox"/>	Electronic Resources	(25)	
<input type="checkbox"/>	Sound recording	(20)	

The majority of records that require a 007 field already contain it and will not need one to be added. When importing records from SmartPort or attaching your items (holdings) within the MSC it is important to check bib records for the 007, as per the records standards in [section 2.1](#).

If you are experiencing display problems in Enterprise you may edit 007s to resolve these issues by adding the appropriate 007 or by [opening a ticket](#) with MSC Admin. Whenever possible, select records in

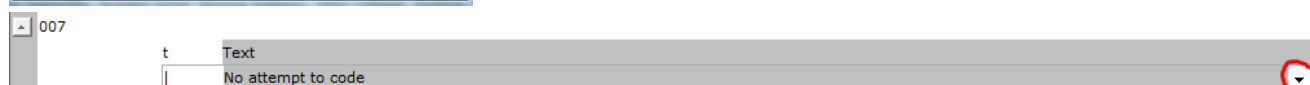


OCLC that contain 007s for non-book materials. If the 007 is not available in a record of good quality, you should select the best record and add the 007 during the Capture process in SmartPort.

How to add a 007 field

The 007 is a fixed field and cannot have free text added to it as another field, such as a 246 or 505, would. Once 007 is entered as the new tag, type the Tab key to receive the first fixed field byte for this field. The inset pop-up will appear. Select your format, click OK.

Depending upon the format selected from the first pop-up, additional bytes may be needed. With each byte added, you can select the new code from additional drop downs.



Once all the bytes for the format have been added, you may view the fixed field in one of two views. You can toggle back and forth using the arrow next to the tag number.

Expanded View – for editing	Collapsed View –for viewing

Large Print books

Permanent Full Records that almost never have the 007 but need it are those for Large Print (see [section 6.2](#)). All large print books can be coded “007 tb” where “t” is text and “b” is large print. No other byte information is required for MARC standards or Enterprise.

All other formats

Because Enterprise uses only the first two bytes to display format, display issues can be corrected by adding two bytes of the 007 for the following formats:

Format	First two bytes of 007 in Collapsed view
DVD	vd
VHS	vf
Audio cassette	sf
Audio CD	sd
Large print	tb
Kit (see section 5.5)	o
Downloadable e/audiobook/video	cr

General information about the 007 can be found on OCLC's [007 Introduction page](#), specific information broken down by bytes and subfields can be found in the [Field 007 Values table](#). For more information about adding the 007, view the [training video](#).

6.6 Notes fields (5XX)

Fields like the 505 (Contents note) and 520 (Summary) are encouraged. All local notes should go at the item level.

Types of 5XX notes are too numerous to list here however the following are examples of titles within the Catalog that can be referred to for as guides for proper formatting:

EXAMPLES:

General Note: 500 __ Summary adapted from back cover.

Bibliography Note: 504 __ Includes bibliographic references (p. 574-581) and index.

Contents Note: 505 0 _ Belton Chalet (West Glacier) -- Boulder Hot Springs Resort (Polaris) [...]

Summary Note: 520 __ Covering the communities of: Denton, Fergus County, Geraldine, [...]

Accelerated Reader Note: 526 0 _ Accelerated Reader AR|bMG|4.6|d5.0|z11

Award note: 586 __ Newbery Medal, 1978.

6.7 ISBN Numbers (020 tag)

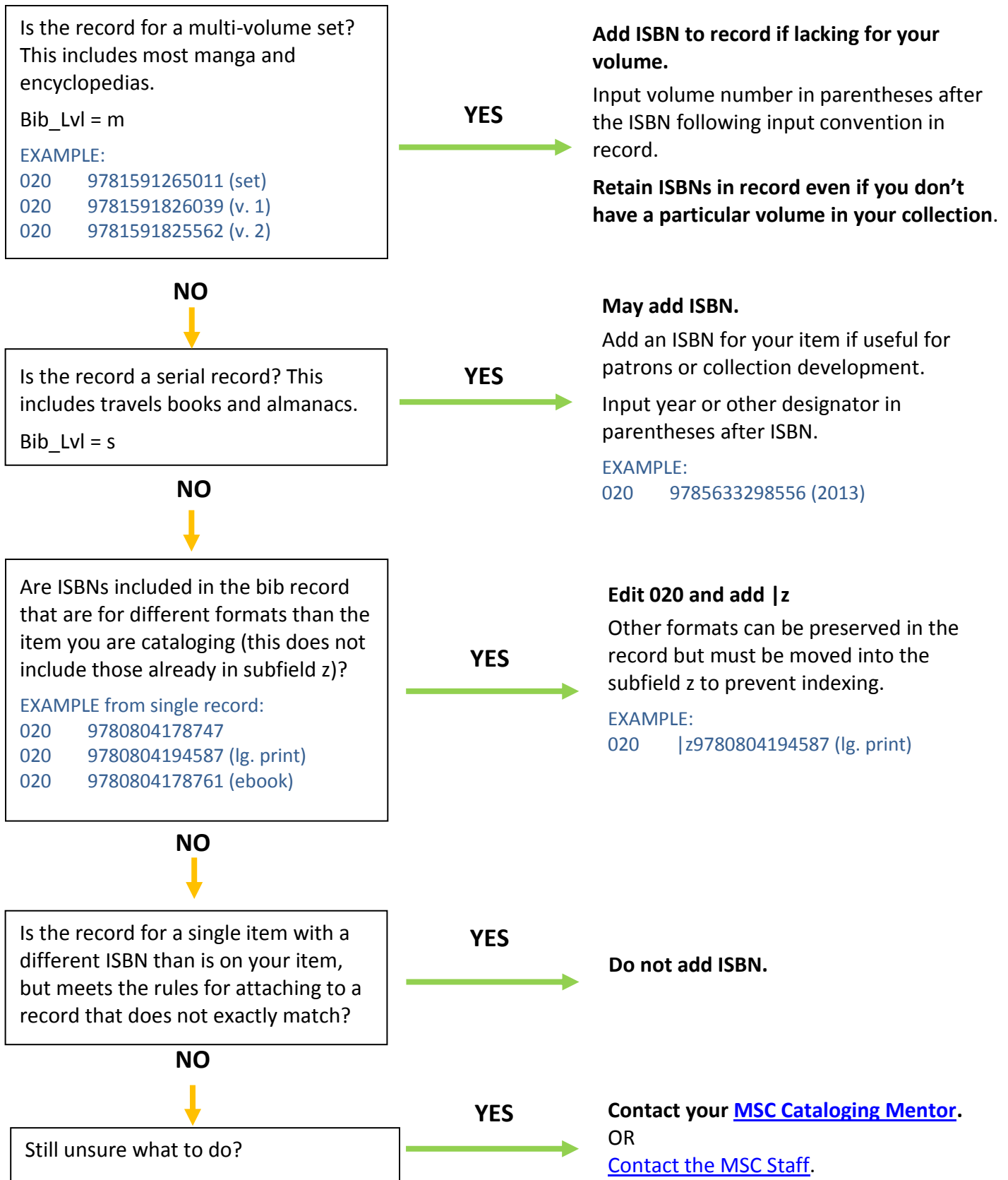
The 020 field contains ISBNs that refer to the specific version of the title in the subfield a. This field is repeatable and will often have at least 2 fields for the ISBN-10 and ISBN-13. In some cases there will be additional 020, beginning with a subfield z, that references other versions of the same title (e.g. audiobook version, large print version). You should not remove ISBNs in the subfield z as they are not indexed.

As a rule, do not add additional ISBNs to a bib. This can create overlay and merging problems when new libraries are added. If you feel you need the ISBN that exactly matches your particular copy, put it in the holdings information for your item. If you encounter an ISBN for a different format in the record for your title do not remove the ISBN. Please edit the field by adding a |z before the other format's ISBN.

An exception to the above is for serial records such as travel books and almanacs or multi-volume records such as manga. You may add an ISBN to serial bib records for a specific volume you add if this is advantageous to users or collection development; you should add an ISBN for multi-volume sets if missing. If you are unsure whether or not you need to add an ISBN to serial/series/multi-part works titles please refer to the flow chart below and the one in [section 7.0.1](#). Any series/serial/multi-part work where the titles share a bib record may have ISBNs added. If titles are on their own bib record then do not add ISBNs for one title to the record for another title.

6.7.1 ISBNs: a helpful flowchart

Follow the chart when deciding whether you need to add, retain, or delete ISBNs.



6.8 Subject Headings—General (6xx tags)

If additional subject headings are needed on the bib record, please attempt to find and use authorized subject headings. Try to locate the subject heading in another record with similar subject matter, then copy and paste it into the bib you want to enhance. If you cannot find the exact heading you want to use, try to follow the example of an established heading from another bib record. Established headings are generally underlined when displaying a bib record. Headings that have yet to be established usually are followed by the word Unauthorized.

6.9 Montana-Specific Subject Headings (6xx tags)

The following subject headings can be added to bib records for works created or performed by Montana residents.

650 _0 Authors, American|zMontana.
650 _0 Poets, American|zMontana.
650 _0 Musicians|zMontana.
650 _0 Musical groups|zMontana.
650 _0 Actors and actresses|zMontana.

For stories that take place in Montana use:

651 _0 Montana|vFiction.

Please use the following guidelines to determine if the author or performer qualifies as a “Montana Author”

- Currently lives in Montana
- Born and raised in Montana
- Wrote the book while living in Montana
- Lived in Montana for a substantial length of time.

6.10 Reading and interest levels/Accelerated Reader, Reading Counts & Lexiles

[Accelerated Reader \(AR\)](#) information that is specific to your library can be added as an item level public note. Most AR information universally to the title and can be added in a 526 Study Program Information field. For consistent records throughout the catalog, please enter AR or other reading program information as follows:

526 0_ |a Program Name |b Interest level |c Reading level |d Title point level.

EXAMPLES:

526 0_ Accelerated Reader AR-TOS|c4.4|d0.5

526 0_ Reading Counts RC |c5.2|d2.0

[Lexile](#) information is universally applicable to printed materials and can be added in a 521 Target Audience field. Please enter the Lexile Measure in the subfield a, and indicate Lexile as the audience in subfield b.

EXAMPLE: 521 8_ 770|bLexile

6.11 Electronic location and access/maintaining hyperlinks (856)

The 856 tag contains hyperlinks and descriptive text that allow users to access an electronic resource or supplementary material. This tag is used in electronic resource bibliographic records including: ebooks,

electronic journals, and websites. It may also be used in non-electronic resource bibliographic records when an electronic version or electronic supplementary material is available, such as cover images or summaries.

Hyperlinks or URLs (Uniform Resource Locators) are contained in the u subfield of the 856 and provide the internet address for the resource described in the record or for supplementary materials (such as summaries, tables or contents or cover art). In most cases the hyperlink represents access to the material itself. Over time, the resource can be moved from the location specified by the hyperlink to another, or be taken down entirely. This constitutes link rot, and may result in a 404 error or a “broken link.” Sometimes the content of website at the web address will change so that the record description no longer applies to the resource and this constitutes reference rot.

PURLs (Permanent Universal Resource Locators) are links designed to be more permanent than ordinary URLs. The originator of the PURL maintains a database that matches the identifier with the resources location. PURLs that fail can be reported to the host institution in which case they will update the database and resolve the broken link.

Descriptive text is included in the subfield z of the 856 field. It describes the access users can expect to have to the resource and replaces the link address in the Enterprise display. Not all records provide access to all MSC patrons. If access is limited to the holding library’s patrons this must be noted in the subfield z (See section [6.11.3](#)).

|u<http://montanalibrary2go.org/ContentDetails.htm?ID=4E80CC6D-CFE6-4E6D-B9E2-034E617F6B4C>
|zClick here to access MontanaLibrary2Go title or place hold

(WorkFlows Display)

Electronic Access Click here to access MontanaLibrary2Go title or place hold

(Enterprise Display)

6.11.1 Standards for 856 field maintenance

The following standard is intended to ensure the continued quality and reliability of hyperlinks and their descriptive text within 856 tags in the MSC.

- 98% of the hyperlinks in each member library’s items (holdings) must work, leading to the electronic resources they describe.
- When adding records containing hyperlinks into the catalog, members must test the hyperlink for accuracy.
- If records containing hyperlinks are purchased from vendors and loaded using batch processes, records must be reviewed in accordance with the processes detailed in [section 3.4](#).
- Member libraries have a responsibility to report rotten links to the holding library.
- Holding libraries (those members with items attached to the bibliographic record) have a responsibility to resolve or initiate the resolution of linking problems.
- Holding libraries are responsible for ensuring that descriptive text makes access clear to patrons (see [section 6.11.3](#))
- Hyperlinks should regularly be tested for functionality using automated link resolver software in a manner equivalent to inventory or weeding of physical collections.

6.11.2 Guidelines for maintaining hyperlinks in 856 subfield u

Members are not required to repair all links themselves, but they are responsible for initiating a resolution to the issue. When maintaining hyperlinks in existing records:

- Initiate the process of determining link rot by opening a [help desk ticket](#) and requesting an inventory of your electronic holdings.
- From the output of the inventory, try to discern hyperlink failure (extra spaces, website shift, subscription lapse, etc.)
- If the link is a PURL contact the link author.
- If the record belongs to MontanaLibrary2Go or another vendor, contact OverDrive or the vendor.
- Check OCLC for record updates, it is possible that the URL has been updated there.
- Evaluate the resource for suitability in your library and deselect if no longer useful.
- Repair the broken link in the Modify Title Wizard.
- You may retain old or broken hyperlinks in a note. Only functional links should be retained in the 856 field. Discard items to which your library no longer has access.

6.11.3 Guidelines for adding descriptive text in the subfield z

The descriptive text displays instead of the URL in the OPAC display. The exact wording of the text should reflect which patrons have access to the electronic resource. When constructing or editing the descriptive text, keep all MSC libraries and patron display a primary concern.

- Use concise, natural language in construction of the descriptive text.
- Note if access is restricted and to which library.
- If purchasing records for electronic materials from vendors, be sure to keep these guidelines in mind when making choices with your vendor (see section 3.4).

EXAMPLES:

|zClick to access this Park High School title or place a hold

|zClick to view report (online access provided by Montana State Library)

|zClick to access (available to MDT employees only)

6.12 RDA Content, Media & Carrier Type fields (336, 337 & 338 or 33X)

The new RDA fields of Content and Media do not have many functions yet in the MSC. The 338 field, or Carrier Type, however, governs the information that appears in the Additional Information column in WorkFlows. This field allows staff to quickly determine material format. The majority of new records coming from OCLC already contain these fields and will not need them to be added. However, if you encounter a bib record in the MSC or bring one in through SmartPort without these fields you must add them.

33x fields have a controlled vocabulary and are not free text. Each field contains 3 subfields (a, b & 2) which must be included. Please view the [training video](#) for assistance in adding these fields and their subfields. When editing these fields you will only be able to select options from drop down menus. You may refer to other records in the MSC for reference or the Library of Congress listing of the controlled vocabulary for these fields:

336 [Content Type](#)

337 [Media Type](#)

338 [Carrier Type](#)

EXAMPLE for a physical book:

```
336 text|btxt|2rdacontent
337 unmediated|bn|2rdamedia
338 volume|bnc|2rdacarrier
```

EXAMPLE for a videorecording:

```
336 two-dimensional moving image|btdi|2rdacontent
337 video|bv|2rdamedia
338 videodisc|bvd|2rdacarrier
```

EXAMPLE for a kit or eReader:

```
336 text|btxt|2rdacontent
337 unmediated|bn|2rdamedia
338 object|bnr|2rdacarrier
```

7. Cataloging serials, series, multi-part works & applying analytics

Determining whether your item is a serial, series or multi-part work can be difficult. Definitions are fluid and rely on cataloger's judgment. Call number analytics are used when an item is a part of what is described in the bibliographic record to which it is attached. This is referred to as "analyzing", thus the term analytics. Call number analytics tell the system and users which specific part(s) of a series you own.

Call number analytics are entered in the subfield |Z of the call number. The use of a separate subfield for this information enables Workflows to accurately sort items and allows staff and patrons to place holds on individual items. Workflows will recognize specific characters in call numbers to automatically insert a subfield |Z. For example |Z will automatically insert if one adds V. space to a call number. Workflows requires a space be entered after the alpha character in order to do a proper sort. If an analytic does not include a system recognized character, you will need to manually input the subfield |Z code. For example, when adding a year to an item on a serial record, manually key in |Z2011 rather than simply entering 2011.

Spacing, punctuation, and abbreviations matter when using subfield |Z. Inconsistency negatively affects everyone in the catalog. Correctly formatted subfield |Z allows readable displays and accurate sorting.

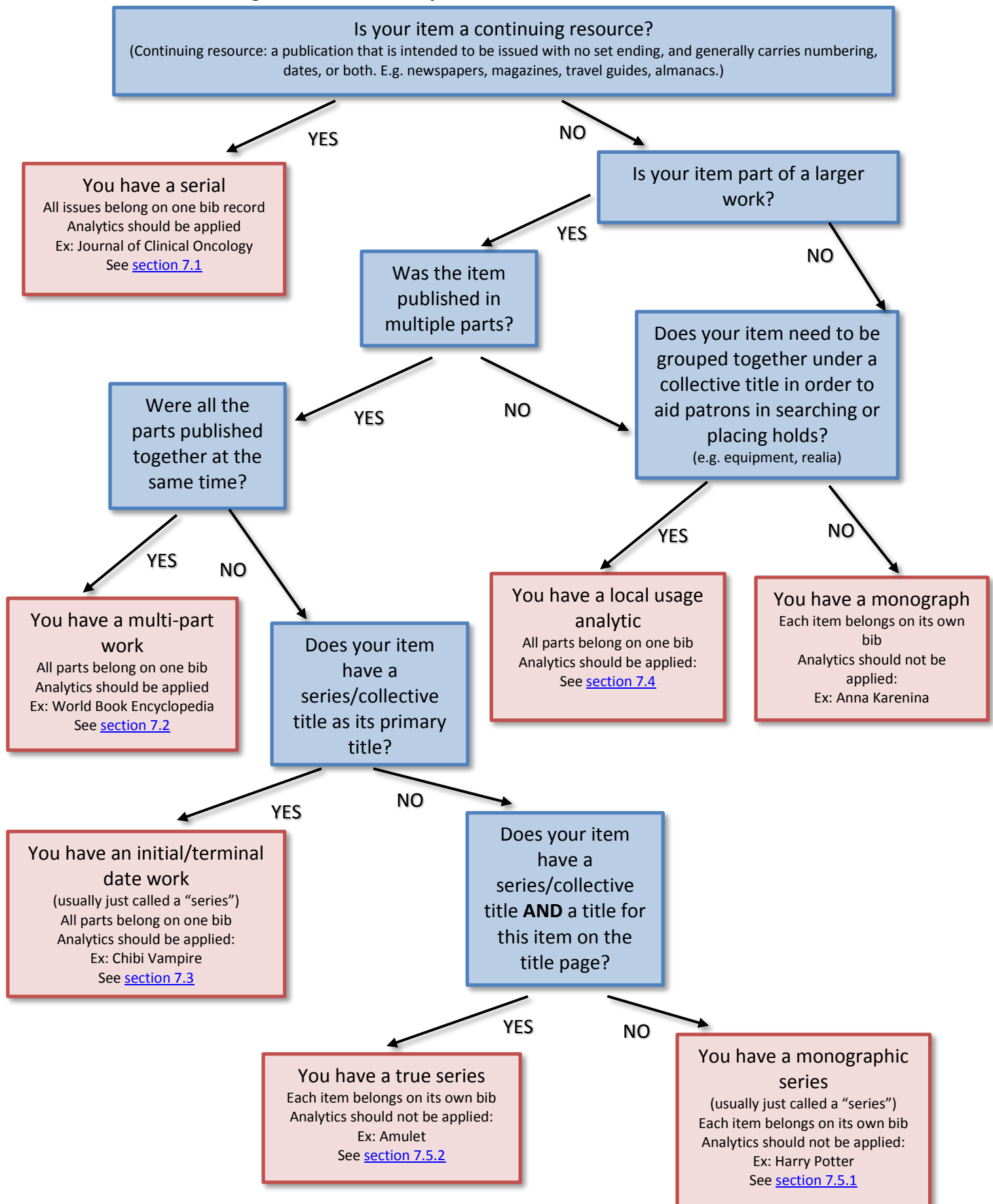
Incorrectly formatted |Z causes patron confusion, and makes it exceedingly difficult for patrons and librarians to choose and place holds on the exact item they want.

Serials, series and multi-part works will not always require call number analytics, and sometimes call number analytics will need to be used for other types of titles. You must pay particular attention when cataloging AV titles like DVD series and manga titles. When cataloging items that use analytics, check to see what other libraries have done and use the same format unless it does not follow the rules outlined here. If the format does not match MSC standards please contact MSC staff so they may correct the analytics.

Before reading the other sub-sections in section 7, please use this [flow chart in 7.0.1](#) to determine which sort of item you have. Once you know what you have, use the corresponding sub-sections to determine how to select the appropriate bib record and how to assign call number analytics if necessary. Special considerations for AV items are covered in [section 7.6](#).

Remember to keep the needs of the user in mind.

7.0.1 Whether to Assign Call Number Analytics: a flowchart



7.1 Serials

Serial records describe an entire run of a publication over time but libraries create separate item records for each volume, or a part of the bib record. For example, Frommer's Guide to Alaska, which comes out annually, attached to a serial record, would use call number analytics to tell patrons which specific year your library owns.

7.1.1 Entering Individual Issues of Periodicals into the MSC

Use this process if your library does not use the Serial Control Module

To enter an individual periodical, search for a serial record in the Montana Shared Catalog. If a record does not exist, a record must be imported from OCLC using SmartPort (see [section 3.3](#)). The process is the same as it is for importing other records.

An easy method to search for serial records in the MSC (at least the first time):

1. Select Periodical Title for the Index search.
2. Set the Library default to MSLA-MAIN, FCL-MAIN or BOZEMAN (these libraries have established serial records for many of the most common serials). **IF** you do not find a serial control record at one of these libraries, search **ALL** libraries before importing a new record.
3. There may still be several titles to select from the list. View the holdings to see if multiple holdings have been added by other libraries. This should be the current serial record.
4. Go to Modify record > Add call number
5. Create a call number using the methods listed below. In general, the call number will have two parts: for part 1, you may wish to call it Magazine, Mag, or nothing at all; for part 2, add the date using the rules listed below. Do not add extra spaces or punctuation in the call number.
6. **IMPORTANT:** use the class scheme of Dewey unless your library uses another class scheme.
7. **REMINDER:** you must still search ALL libraries before importing a new serial record.

Advantages for using this method

- All holdings will be on one record instead of many.
- Holdings records will be in order first by year, then alphabetical by month (FEB will file before JAN, JAN before NOV), and one year can be seen at a glance.
- This keeps bibliographic records to a minimum.
- No clean-up is needed for entries in the future.
- Discarding of issues will be simpler and complete.
- After adding a holding, you will be able to search for the serial record under your own library designation.

Call number date rules for periodicals and annuals

You must manually add |Z in front of any date below. The character before the "Z" is called a "pipe." It can be inserted by holding down Shift and the key above ENTER.

- Annual publications on a serial record should contain the year in subfield |Z. These include travel guides like Frommer's and Fodor's, as well as almanacs and record books. The format should be: CALLNUM|ZYEAR. Enter four digits to signify the year. Do not use Roman numerals.

EXAMPLE: 915.1 FODORS|Z2012

- If a span of years is indicated, enter one four-digit year separated by a slash, then input the ending year using only two digits.

EXAMPLE: |Z2011/12

- Abbreviate months and seasons (with the exception of FALL, do not use AUT) to their first three letters; capitalize.

EXAMPLES:

JAN, FEB, MAR, APR, MAY, JUN, JUL, AUG, SEP, OCT, NOV, DEC

WIN, SPR, SUM, FALL

|Z2011 MAR

|Z2012 DEC 25

|Z2000 SUM

|Z2011 JAN/APR

|Z2010/2011 DEC/JAN 28/4

- Enter a slash between dates for multiple issues combined into one issue.

EXAMPLE: |Z2011 Oct 17/24

- Enter a slash to separate combined months or seasons.

EXAMPLES:

|Z2009 JUN/JUL

|Z1998 FALL/WIN

- Enter month or season analytics in one of the following formats:

SEP 2011 enter as |Z2011 SEP

SEP, 2011 enter as |Z2011 SEP

FALL 2011 enter as |Z2011 FALL

FALL, 2011 enter as |Z2011 FALL

SEP/OCT 2011 enter as |Z2011 SEP/OCT

SEP/OCT, 2011 enter as |Z2011 SEP/OCT

- Serial records that have multiple volumes per year, such as the Montana Code Annotated, should be entered as: CALLNUM|Z2011 V. 1.

EXAMPLE: 342.786 MONTANA|Z2013 V. 5

7.1.2 Using the Serials Module

SirsiDynix Symphony Workflows does include a Serials Module, which allows libraries to create periodical predictions and manage higher volumes of periodicals within the system. If your library manages a lot of periodicals and you are interested in using this module, [Contact MSC Staff](#) to arrange for special training.

7.2 Multi-part works

Multi-part works are those titles that have been published in separate volumes, usually all at one time. Publication year may be part of the base call number for multi-volume works, such as encyclopedias, and should not be included in subfield |Z. [Contact your mentor](#) for guidance in identifying if this is the case.

EXAMPLE: 030 WORLD 2012|ZV. 14

7.3 Initial/terminal date work

Initial/terminal date works are those collections or multi-part works that are not true continuing resources (serials) but are issued over more than one year. In the MSC this designation is used primarily

for manga titles but also for other titles, which appear to be the same as serials but often have a shorter date range of publication in that they are not intended to be issued indefinitely.

Initial/terminal date works can be identified by the “m” in the 6th position of the fixed field. They also need to have the initial date of publication for the first volume in the Date1 field and the terminal date of the last volume in the Date2 field. If the work is still being published it is permissible to have “9999” as the terminal date but this date must be updated once publication of the series has ceased.

All volumes of the titles should be on the same bib and analytics should be applied, as follows:

EXAMPLES:

Title: Chibi Vampire
 Dat_Tp m
 Date1 2003
 Date2 2010
 Call No: KAGESAKI|ZV. 14

Title: Fruits Basket
 Dat_Tp m
 Date1 1998
 Date2 2006
 Call No: TAKAYA|ZV. 22

These fixed field elements appear in the leader, or 008 field, as pictured below. The top image is the collapsed view and bottom is the expanded view. It is easier to edit the Date2 field if you are viewing the fixed fields in the expanded view.

008	06072	m20069999	aua d	000*c eng d			
Rec_Type	a	Bib_Lvl	m	TypeCtrl		Enc_Lvl	K
Desc	a	Entrd	060720	Dat_Tp	m	Date1	2006
Date2	9999	Ctry	cau	Illus	a	Audience	d
Repr		Cont		GovtPub		ConfPub	0
Festschr	0	Indx	0	Fiction	c	Biog	
Lang	eng	Mod Rec		Source	d		

7.4 Local usage analytics

In many cases analytics need to be applied for specific purposes in your library even though your item is not a serial, series or multi-part work. This is most likely to happen if you have several items that need to be searchable all together but individually placed on hold.

EXAMPLE:

Title: Life jacket
 Call No: YELLOW/BLUE ADULT|ZLARGE
 Call No: RED/YELLOW INFANT|ZSMALL

By entering the call numbers in this way it is possible for staff or patrons to place a hold on just one of the call numbers on the title. This method is also useful for certain types of AV materials (see [section 7.6](#)).

7.5 Series

The MSC does not recommend applying analytics for series in the same way that it does for serials or multi-part works. Instead, linking books within a series can be handled by using the series statement 490 and the 800/830 tags (see [section 6.4](#)). These titles should be on their own bib records and call number

analytics should not be applied; however the series information can still be included in the call number. To aid patrons in finding the next book in the series, consider assigning call numbers as outlined below.

7.5.1 Monographic series

Monographic series are those series where there is no series title featured on the title page or the individual item's title is clearly of greater importance than the series title, but the item is still obviously part of a larger series. Examples of monographic series include the Harry Potter and Stephanie Plum novels. These items belong on their own bib records and analytics should not be applied. Series information can be included in the call number as shown in the example.

EXAMPLE:

Title: Harry Potter and the Prisoner of Azkaban

Call No: J ROWLING #3

7.5.2 True series

True series are items where the series title and individual titles are both featured on the title page and it may be hard to determine whether the individual title or series titles is preferred. These titles may or may not have a series number officially assigned. With true series it is important that staff and patrons can easily search by both the series title and the book's individual title. The preferred way to handle these items in the MSC is to have each of the individual titles on its own record and to not apply call number analytics. Series information can be included in the record as shown in the example.

EXAMPLE:

Title: Amulet. Book 6. Escape from Lucien

245 Amulet. |n Book six, |p Escape from Lucien

246 Escape from Lucien

490 Amulet ; |v book six

Call No: J KIBUSHI #6

7.6 Special consideration for AV series titles

Because MSC libraries handle and circulate AV items differently each MSC library can decide how to handle assigning call numbers. Some examples are discussed below.

Books on CD/Cassette

In most instances, audiobooks on CD are circulated as one item, even if there are 30 or more CDs in the case. There are those rare instances where a book on CD may have too many CDs to fit in one case. If your library has to split audiobooks into volumes because of case size limitations, use the rules for Local Usage Analytics or Multi-part works (see sections [7.4](#) and [7.2](#)).

Music CDs

Occasionally, music CD compilations are issued in multiple volumes. For these items use the rules for Multi-part works (see [section 7.2](#)).

TV Series on DVD/VHS

Though most TV series are released over multiple seasons they are generally cataloged by season and not by the whole title (e.g. X-Files. The complete fourth season.). For this reason, TV series are not cataloged like serials but instead should be dealt with in one of two ways based on circulation:

1. If your library circulates all discs for an entire season together, do not apply analytics and assign call numbers as traditional monographs, or indicate the season number in the same manner as a True Series (see [section 7.5.2](#)).

EXAMPLE: Call No: DVD XFILES #4

2. If your library circulates each disc of a season separately, apply analytics as Local Usage Analytics (see [section 7.4](#)), where each case is assigned a volume number. This will allow patrons to place holds on individual discs in the season, saving staff time and avoiding copy-level holds.

EXAMPLE: Call No.: DVD XFILES|ZV. 2.

Bibs with Multiple formats

When items attached to one bibliographic record are barcoded separately because they have different formats, this should be indicated using call number |Z format with each format spelled out completely. The |Z information must be manually entered in these cases.

EXAMPLE: LINCOLN|ZDVD and LINCOLN|ZBOOK.

EXAMPLE: DVD LAND|ZDVD and DVD LAND|ZBLU-RAY

8. Transferring, Discarding & Deleting Records

When an item record is discovered to be incorrect or when an item is being removed from your library, the item should be transferred to a better record, discarded, or deleted. Please read the following sections to determine which action is appropriate for your record.

8.1 Transferring records

When multiple bib records exist in the catalog for items that are deemed to be the same according to MSC policies (see [section 3.1](#)) the better record should be selected (see [section 2](#) for record standards) and all holdings should be transferred from the duplicate record(s) to the better record. When selecting the better record be sure to check for enhancements such as reading levels. Make notes of enhancements and add them to the better record as described in [section 6](#).

For additional assistance with transferring, please view the [training video](#).

*Note: Most libraries only have the ability to transfer their own items but some members of sharing groups do have the ability to transfer other libraries' items. If this is the case for your library, please use caution when transferring records. If you notice a problem with another library's items alert them to the issue, but do not transfer their items. If you have concerns you can also [contact your mentor](#) or [MSC staff](#).

8.1.1 Setup in Workflows

Right click on Transfer Titles, Call Numbers or Items, found in the Special toolbar in Cataloging. On the Behavior tab, check the boxes next to "Allow Transfer of all existing call numbers and items in a title." Also check the box for "Prompt for confirmation before transferring all call numbers and items." Otherwise you will not be able to transfer any of your items if they are the last item you have on a bib record. As noted above, this will prevent you from editing other libraries' items unless you already had that ability.

8.1.2 How to transfer

1. From the Cataloging toolbar select Transfer Titles, Call Numbers, or Items listed under the Special toolbar.
2. Search for the duplicate records you wish to work with.
3. Review all appropriate records to determine which is the most complete and accurate.
4. If possible, retain the Library of Congress record (DLC in 040 tag), transferring less desirable records to that record.
5. You can use the Display Bibliographic Description wizard to review the bib records.
6. If you wish to retain any enhancement information from the “old” record, it’s helpful to write that down before you complete the transfer. You can also copy and paste the enhancements into a document to be added to the “new” record later.
7. Select the “bad” record that will be transferred and click Add to Tree. Repeat this step for the “good” record you would like to transfer your item to. Both records will now be listed in the center section.
8. Click the plus sign next to the title you want to transfer information from. Choose the call number and item of the record and click Retain for Transfer. The record will become bold and italicized once you’ve selected it for transfer.
9. Select the title of the destination record and click Transfer.
10. Note: These steps describe transferring call numbers with items to a different title. The level at which you select items will affect the transfer. See chart below for information on transferring other levels of records.



Item ID level



Call Number level



Title/Bib record level

“To be Transferred” Level	“Destination” Level	Results
Item ID	<ul style="list-style-type: none"> • Call Number • Item ID 	Item ID transfers and becomes next copy number (ex. copy 2) under the Destination Call Number. The item loses the call number it had before the transfer.
Call Number	<ul style="list-style-type: none"> • Title • Call Number • Item ID 	All of these transfers retain the original call number with the item ID. If the transfer removes the last item attached to a call number or title you may get a message alerting you about the removal the old record.
Title	<ul style="list-style-type: none"> • Title • Call Number • Item ID 	All of these transfers retain the original Call number with the item ID. If the transfer removes the last item attached to a call number or title you may get a message alerting you about the removal the old record.

- When you transfer the last item attached to a title, you will prompted to approve the removal of that title if you set your properties as recommended above. Accepting the prompt will cause the empty bib record to be removed from the system.
- Items transferred within the MSC in this manner are not uploaded to OCLC as deletions or additions. You’ll need to do this work separately in Connexion after you complete the transfer in Workflows.

8.2 Choosing discard or delete

There are two ways to remove records from the MSC: Discard and Delete. OCLC holdings are NOT updated when an item or title is deleted. In general, if your library has more than one barcode/item ID left on the bib record, you should use the delete option. Once there is only one barcode belonging to

your library on the bib record, you should use the discard option. Before you begin, take the time to view the [training video](#).

Use **DISCARD** when:

- It is your library's last copy on that bib record and the holding also needs to be removed from OCLC.

Use **DELETE** when you want to:

- Remove a second or higher copy of an item on a title where you have multiple items on the same bib record. This also applies to books on a serial bib record.
- Remove brief records (including ILLs) that were never submitted to OCLC.

Notes about the discard process

- All items with a home location of DISCARD will be removed from both the MSC and OCLC once a month by MSC Admins. A count of the number of items each library discarded is emailed to the MSC Discussion list.
- Any item that is checked-out (charged), has a hold, is under serial control, or is linked to an order record will not be removed. A list of all such items will be emailed to the MSC Discussion list for investigation. This report is called the "Problem Discard List" and each library is responsible for reconciling these items. After holds, check-outs, or serial controls have been addressed, the item can be left in DISCARD until the next month. DISCARD is a shadowed home location, so items will not appear to the public in the online catalog.

8.2.1 Discard using Call Number and Item Maintenance

1. Make sure the item is checked-in and there are no holds attached to the item record.
2. Set the Call Number and Item Maintenance wizard properties to search by Item ID (right-click Wizard, select Properties from menu, & select Item ID for "Preferred search index").
3. Search for the item by scanning the barcode. Change the "Home Location" to Discard.
4. This will not immediately remove the record. The record will remain in the system until the first of the month when the OCLC Upload and OCLC Discard reports are run. At that time the record will disappear. However, since DISCARD is a shadowed location the record will not appear to the public on the online card catalog.
5. Note: If you do not have the item in hand, this same process can be followed using a title search. Just be certain that you are discarding the correct item.

8.2.2 Discard using Global Item Modification

1. Select Global Item Modification from the Item Maintenance toolbar.
2. Choose DISCARD from the drop down list for Home Location. Do not change any other values.
3. Scan barcodes of items to be discarded. You will see each item being modified as you go.
4. Note: You should still verify that the items to be discarded are checked-in and that there are no holds on the items.

8.2.3 Replacing a copy – discard or delete old copy

If an item is the LAST copy held by your library and a new copy has been ordered:

1. If the new on-order copy matches the existing bib, you may remove the old copy using a Delete procedure after adding the new item.

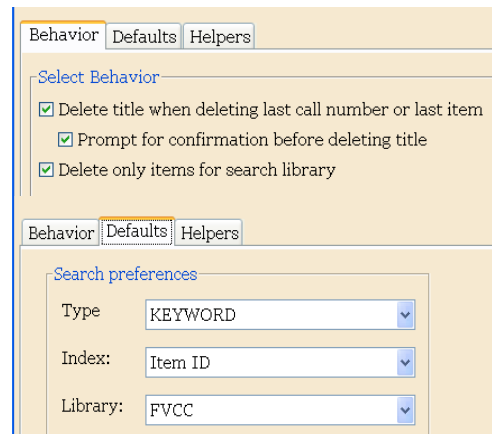
2. If the new on-order copy does not match the existing bib, i.e., a new edition or different translator has been ordered, use Discard to remove the item and subsequently update OCLC holdings.

8.2.4 Delete using Delete Title, Call Numbers or Items

1. Make sure item is checked-in and there are no holds attached to the item record. Also confirm that OCLC holdings do not need to be updated.
2. Click on the Delete Title, Call Numbers or Items wizard found in the Title Maintenance group of wizards.
3. Check your Properties settings (right click on wizard and select Properties)

Check the “Delete only items for search library” box as a safety measure.

Make sure you are set to search by Item ID and your library only.



4. Click OK when Properties are set.
5. Search for item by scanning barcode. You need to click the box next to the item you want to delete. The title will be bolded and in italics. Then click the Delete button.

8.2.5 Delete using Call Number and Item Maintenance

*Note: this is used for deleting call numbers and items. For deleting titles/bib records, please see [section 8.2.3](#).

1. Click on the Call Number and Item Maintenance wizard. Search for the title that you want to work with. Highlight it.
2. Click on Modify. Make sure you are in the Call Number/Item tab.
3. Click on the item or call number you want to delete, and click on the Delete button. (If you delete a call number, all the items below it will be deleted. If you only want to delete a single copy, highlight the item level (where the barcode is).

9. Resources & Contacts

Guidance for content and management of the records in the Montana Shared Catalog comes from the MSC Content Management Committee. A description of the committee’s functions and operations, as well as a current list of members, is available on the [MSC Committees](#) page.

9.1 All about mentors

To help libraries that are new to the MSC or need cataloging assistance, each library has been assigned a mentor. [MSC Cataloging Mentors](#) can assist members with difficult copy cataloging and original

cataloging questions. Mentors do not catalog for members but can offer support and peer training. Please note that mentors and their home libraries are not paid for their services.

Record review

If you have cataloged a title in OCLC Connexion and would like someone with a little more cataloging experience to look at it, contact your mentor. Have your record's OCLC number or Title Control number ready so that your mentor can easily find it. The review process can consist of checking for accurate tags, indicators, fixed fields, authorities, etc. Mentors must be notified when a new record needs review. For easy communication, it is better to contact your mentor before you catalog a new record. The cataloging mentor will strive to review records in a timely fashion and make suggestions for approval.

9.2 MSC website & contacts

The [MSC Website](#) contains valuable information and reference for all MSC members. The [MSC Cataloging Page](#) exists as a reference for all MSC policies that pertain to cataloging and technical services. MSC staff are available for ongoing training and support. Individual staff member's contact information can be found on the [Contact Us](#) page.

Training

MSC staff regularly offer regional and online training specific to cataloging and technical services. Upcoming trainings and webinars are announced on the "[msc-discuss](#)" General Discussion Group. The [MSC Learning Portal page](#) is indexed by topic and features specific modules pertaining to [Cataloging](#), including handouts and archived webinars. Because not all cataloging staff are on the msc-discuss list, directors can request that staff be added to the msc-techservices listserv for special topics pertaining to cataloging. To make this request please open a [help desk ticket](#) with the staff member's email address.

Support

MSC staff can assist with cataloging in many ways. For example, if you have a group of records that need a specific change, MSC staff may be able to apply that change to the records all at once rather than individually. To request assistance, open a [help desk ticket](#).

Appendix – MARC Tag Cheat Sheet

The links below go to [OCLC Bibliographic Formats and Standards](#) unless otherwise noted.

0XX Bibliographic control number and codes (including call numbers)

- [007](#) Physical characteristics fixed field – for audio/visual, large print and kits.
- [010](#) Library of Congress Catalog/Card Number
- [020](#) ISBN
- [022](#) ISSN
- 035 System Control Number (OCLC Control Number)
- [050](#) Library of Congress Call Number
- [060](#) National Library of Medicine Call Number
- [082](#) Dewey Decimal Call Number

1XX Main Entry (Author)

- [100](#) Personal Name
- [110](#) Corporate Name
- [111](#) Conference/Meeting Name

	130	Uniform Title
2XX		Title and Title Paragraph
	240	Uniform Title
	245	Title Statement a Title b Subtitle c Statement of Responsibility
	246	Varying Form of Title
	250	Edition Statement
	260	Publication (obsolete)
	264	RDA Publication, Distribution, Manufacture or Copyright Statement
3XX		Physical Description
	300	Physical Description
	310	Current Publication Frequency
	336	Content Type (LC Controlled Vocabulary List for RDA Content Type)
	337	Media Type (LC Controlled Vocabulary List for RDA Media Type)
	338	Carrier Type (LC Controlled Vocabulary List for RDA Carrier Type)
	362	Dates of Publication and/or Sequential Designation
4XX		Series Statement
	490	Series Statement – (for traced series, see also 800 or 830)
5XX		Notes (Information that does not fit elsewhere)
	500	General Note
	505	Contents Note (titles of songs, table of contents, section names, etc.)
	520	Summary Note
	521	Target Audience Note (Lexiles and movie ratings)
	526	Study Program Information Note (Reading Counts & AR information)
	546	Language Note, for use with with 041
	586	Award Notes (Winners of Caldecott , Newbery , etc.)
6XX		Subject Headings
	600	Subject Added Entry—Personal Name
	610	Subject Added Entry—Corporate Name
	650	Subject Added Entry—Topical Term
	651	Subject Added Entry—Geographic Name
	655	Index Term—Genre/Form
7XX		Added Entries
	700	Added Personal Name
	710	Corporate Body
	785	Succeeding entry (for serials)
8XX		Holdings, Alternative Graphics, etc.
	800	Series Added Entry – Personal Name
	830	Series Added Entry – Uniform Title
	856	Electronic Location and Access (hyperlinks for electronic access)
9XX		Locally Defined Fields